

April 27, 2009

TO: Sherri-Ann Burke, Senior Field Representative  
Washington Federation of State Employees (WFSE)

FROM: Teresa Parsons, SPHR  
Director's Review Program Supervisor

SUBJECT: Sharon Zier v. Department of Information Services (DIS)  
Allocation Review Request ALLO-07-112

On February 25, 2009, I conducted a Director's review conference at the Department of Personnel, 2828 Capitol Boulevard, Olympia, Washington, concerning the allocation of Sharon Zier's position. Present at the Director's review conference were you and Ms. Zier; Starleen Parsons, Human Resource Manager, representing DIS; Theresa Burkheimer, Human Resource Consultant; Michael Martel; Chief Division Manager for the Telecommunications Division; Mike Lilly, Telecommunications Operations Manager; and Larry Whallon, ITS 6 for Telephony Operations and Ms. Zier's supervisor. Marie Davis with the Human Resources Division of the Auditor's Office observed the Director's review conference.

### **Director's Determination**

This position review was based on the work performed for the six-month period prior to August 10, 2007, the date DIS's Human Resources (HR) Office received Ms. Zier's completed Position Review Request. As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review conference, and the verbal comments provided by both parties. Based on my review and analysis of Ms. Zier's assigned duties and responsibilities, I conclude her position is properly allocated to the Information Technology Specialist 4 classification.

### **Background**

On August 10, 2007, Ms. Zier submitted a Position Review Request (PRR) form to DIS's Human Resources Office, requesting that her Information Technology Specialist 4 (ITS 4) position be reallocated to an Information Technology Specialist 5 (ITS 5) (Exhibit A-8). During the Director's review conference, Ms. Zier clarified that she also completed a Position Description Form (PDF) documenting the same duties listed in the PRR but did not submit the PDF to HR (Exhibit A-9). When reviewing Ms. Zier's position, DIS also

considered the PDF on file for her position, which was an electronic version dated June 29, 2006 (Exhibit C-2). In addition, Human Resource Consultant Leah Maurseth met with Ms. Zier on September 5, 2007, and spoke with Mr. Whallon regarding Ms. Zier's duties and responsibilities. On October 15, 2007, Ms. Parsons notified Ms. Zier that her position was properly allocated to the ITS 4 classification (Exhibit C-1). In a cover letter for DIS's exhibit packet, dated March 12, 2008, Ms. Maurseth explained DIS's rationale for the allocation determination (Exhibit C).

On November 14, 2007, the Department of Personnel received Ms. Zier's request for a Director's review of DIS's allocation determination.

### **Summary of Ms. Zier's Perspective**

Within the Telecommunication Services Division (TSD) Operations, Ms. Zier works in the Local Telephone Technical Services Unit. Ms. Zier asserts she performs work beyond the voice mail systems and that she has to have substantial knowledge about the PBX system as well. She states she has been assigned project technical lead at different times, including a project at the Secretary of State's office, which included part of the time period relevant to this review. With such a project, Ms. Zier states she coordinates the installation and transfer to the new system, while troubleshooting any problems. Ms. Zier indicates that she also serves on call, participating in the pager coverage rotation for technical support. In that capacity, Ms. Zier states she has had to make decisions affecting the availability of the entire campus and statewide telephony applications systems. Ms. Zier contends she is the only ITS 4 included in the group providing on call coverage and that she performs the same work as the ITS 5 positions in her unit. While Ms. Zier specializes in voicemail, she emphasizes that she has a broad range of knowledge, training, and experience related to the PBX system as well. Ms. Zier believes her position should be reallocated to the ITS 5 position to reflect the higher level work assigned to her position.

### **Summary of DIS's Reasoning**

DIS acknowledges that Ms. Zier's work with voicemail connects to the PBX system but maintains the majority of her assignments involve working with the voicemail related systems and software. DIS asserts the work assigned to ITS 5 positions involves work on the larger PBX system, which has a greater complexity. While DIS acknowledges Ms. Zier performs complex work, DIS describes her assigned work as performance analysis and system design at a senior or specialist level. DIS asserts Ms. Zier may perform some work at an ITS 5 level when working on certain projects or as part of a team to gain additional experience. However, DIS asserts Ms. Zier's position exists primarily to deal with the voice mail systems. DIS recognizes Ms. Zier serves on call but describes it as a portion of her overall responsibility that does not make up the majority of her time or work. DIS contends the majority of her assigned duties and responsibilities fit within the ITS 4 classification.

### **Rationale for Director's Determination**

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is

performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

The Position Description Form (PDF) dated June 29, 2006 describes the position's purpose as follows (Exhibit C-2):

. . . performs specialized technical consulting, network & systems analysis and troubleshooting and applications software design, installation, and maintenance for voice applications. Work is performed on and requires substantial familiarity with a statewide network of PBXs, Centrexes, voice mail systems, Interactive voice response systems, automated call distribution systems and call management systems.

On the Position Review Request (PRR) form, Ms. Zier also describes her position's purpose. The following summarizes Ms. Zier's description (Exhibit A-8):

Provide expert system design, troubleshooting, analysis and maintenance for statewide customer premise equipment voicemail systems to include approximately 20,000 voicemail boxes and special applications at 37 networked locations including varied system hardware and software platforms. Perform specialized technical consulting, network and systems analysis for voice applications and software. Manage installation and maintenance of hardware and software for various voice services by vendors, evaluating and resolving complex problems for these high visibility voice application systems. Provide day-to-day monitoring to include identifying and resolving problems involving system capacity or load balancing necessary to achieve committed performance levels. Daily review of PBX remote systems to proactively assure resource availability.

Overall, the scope of work assigned to Ms. Zier's position has remained the same since the June 2006 PDF. During the Director's review conference, Ms. Zier's managers described the Private Branch Exchange (PBX) and voicemail systems as an adjunct system. To illustrate, DIS used a parent/child analogy, describing the PBX as the core system or parent and the voicemail systems working off that PBX as the child systems. The TSD managers indicated that voicemail cannot be accessed without passing through a direct port off the PBX system. Ms. Zier primarily has the responsibility of monitoring the voicemail systems linked to the core PBX system. With regard to the voicemail systems, Ms. Zier's supervisor, Mr. Whallon, agrees she has a high level of expertise. This is consistent with the majority of work described on the PRR. Specifically, the job duties include the following:

- Expert level support for 35 customer premise voicemail systems, including database creation and maintenance, complex system application programming, specialized analysis, documentation, design, and testing for mission critical applications.
- High visibility applications due to customer requirements for efficient services through automated resources.

- Develop and maintain complex database for each site and maintain SQL server and database for voicemail monitoring, reporting, testing, upgrading, and specialized report design.
- Assure systems security via monitoring and password updates.
- Consultation with problem resolution and hardware purchase recommendations for large customers.
- Supervise all voicemail and some PBX software upgrades both in the field and from base location.
- Provide expert system design, troubleshooting, analysis, and maintenance for statewide customer voicemail systems.
- Perform specialized technical consulting, network and systems analysis for voice applications and software design installation, troubleshooting and maintenance for voice applications to include a network of PBXs, Centrexes, Interactive voice response systems, automated call distribution systems, and call management systems.
- Manage installation and maintenance of hardware and software for various voice services by vendors.
- Provide day-to-day monitoring and daily review of PBX remote systems to ensure resource availability. Analyze errors and repair or coordinate and supervise vendor repairs.
- Develop training procedures for team members.

While DIS acknowledges Ms. Zier has a broad understanding of the parent PBX system, her managers do not describe her as an expert with regard to the PBX. Rather, they recognize her special expertise in the area of voicemail and voice applications and all the intricacies related to those systems, which are complex. While Ms. Zier agrees that voicemail is her area of expertise, she notes her position also requires broad knowledge of the PBX. She further indicates that all of the positions assigned to the on call group must understand the complexity and diversity of all the related equipment.

During the Director's review conference, Ms. Zier described the complexity of the voicemail systems, indicating that her responsibility includes defining the parameters of the network nodes and connectivity to other network nodes. She also gave an example of developing an auto attendant for a large state customer, which included determining what steps needed to occur for the customer to receive the service. Ms. Zier indicated she determines step by step procedures based on the customer needs and coordinates the programming within the PBX. While the Operations Manager, Mr. Lilly, agreed she performs a certain level of programming within the PBX, he described her work as customizing a particular installation. Mr. Lilly also stated that the databases are already part of the voicemail systems and that Ms. Zier's role is to customize based on customer needs. Part of Ms. Zier's job is to determine how to put the nodes in place. Ms. Zier's supervisor, Mr. Whallon, indicated that she monitors the alarms in the systems and makes decisions to dispatch vendors out to remote sites. She also evaluates capacity to see if a present system can support an increase in staff voicemail for a particular site. When determining whether licensing software can support additional port availability or trunking, Mr. Whallon indicated Ms. Zier may need to work with an ITS 5. Mr. Whallon further indicated that Ms. Zier may work with

ITS 5 positions on installation project plans but stated that an ITS 5 position would be considered the lead on the project.

The TSD managers described the parent PBX as the main processor for the enterprise system. While the PBX can act as a tool to divert calls through routing, the PBX system has its own unique dialing plan. Some examples of the complexity include certain levels of restrictions to a particular phone or developing different levels of hierarchy for customers. The TSD managers indicated that digital programming when building trunks is highly complex and requires a high level of knowledge about programming and operating the PBX menus. Mr. Lilly reiterated that the primary focus assigned to Ms. Zier's position specifically related to the specialized area of voicemail and how those systems fit within the larger PBX system.

When comparing the assignment of work and level of responsibility to the available class specifications, the class series concept (if one exists) followed by definition and distinguishing characteristics are primary considerations. The Class Series Concept for Information Technology Specialist positions broadly describes positions in one or more information technology disciplines. Some of the IT functions overlap from class to class; however, the definition for each classification within the ITS series distinguishes the level of work assigned to each class. While examples of typical work identified in a class specification do not form the basis for an allocation, they lend support to the work envisioned within a classification.

The distinguishing characteristics of the **Information Technology Specialist 5** classification (class code 479M) state the following:

This is the supervisory or expert level. Provides expert consultation and specialized analysis, design, development, acquisition, installation, maintenance, programming, testing, quality assurance, troubleshooting, and/or problem resolution tasks for major organization-wide, high risk/high impact, or mission-critical applications computing and/or telecommunication systems, projects, databases or database management systems; support products, or operational problems.

Performs highly-complex tasks such as conducting capacity planning to determine organization-wide needs and make recommendations; designing complex agency- or institution-wide enterprise systems crossing multiple networks, platforms or telecommunication environments; overseeing the daily operations of large-scale or enterprise systems; identifying and resolving operational problems for major high risk systems with centralized, organization-wide functions; testing multi-dimensional applications, providing quality assurance; developing standards or enhancing existing, high risk and impact, mission critical applications; integrating business solutions, or writing feasibility studies and decision packages for high visibility/impact initiatives.

Provides leadership and expert consultation for large-scale projects or enterprise systems that often integrate new technology and/or carry out organization-wide information technology functions, or impact other institutions or agencies.

Provides project management leadership, technical expertise and demonstrates knowledge of project management practices, principles, and skills.

May supervise information technology specialists or function as a recognized expert who is sought out by others in resolving or assessing controversial or precedent-setting issues.

Ms. Zier has not been assigned supervisory duties. While her supervisor has indicated she has a high level of expertise in the area of voicemail systems, he clarified that she performs senior or specialist level work within her assigned area, which primarily involves voicemail and voice application systems. The Telecommunications Operations Manager and TSD Chief Division Manager further clarified that while complex, her duties do not involve the highly complex tasks assigned to positions with responsibility for the larger PBX system, which is the main processor for the enterprise system. They also noted that she has not been assigned an expert with regard to the PBX system. However, the TSD managers recognize Ms. Zier works with components of the PBX system because of its connections to the attached voicemail systems. Because the majority of her work relates to the voicemail systems, she does not perform work at the level of complexity or scope of responsibility envisioned by the ITS 5 classification.

The distinguishing characteristics of the **Information Technology Specialist 4** classification (class code 479L) state the following:

Performs analysis, system design, acquisition, installation, maintenance, programming, project management, quality assurance, troubleshooting, problem resolution, and/or consulting tasks for complex computing system, application, data access/retrieval, multi-functional databases or database management systems, telecommunication, project or operational problems.

As a senior-level specialist in an assigned area of responsibility and/or as a team or project leader, applies advanced technical knowledge and considerable discretion to evaluate and resolve complex tasks such as planning and directing large-scale projects; conducting capacity planning; designing multiple-server systems; directing or facilitating the installation of complex systems, hardware, software, application interfaces, or applications; developing and implementing quality assurance testing and performance monitoring; planning, administering, and coordinating organization-wide information technology training; acting as a liaison on the development of applications; representing institution-wide computing and/or telecommunication standards and philosophy at meetings; or developing security policies and standards.

Incumbents understand the customer's business from the perspective of a senior business person and are conversant in the customer's business language. Projects assigned to this level impact geographical groupings of offices/facilities, and/or regional, divisional, or multiple business units with multiple functions. The majority of tasks performed have wide-area impact, integrate new technology, and/or affect how the mission is accomplished.

Ms. Zier's primary responsibilities relate to performing specialized technical work and applying advanced technical knowledge for system analysis, software design, installation and maintenance, while exercising considerable discretion to evaluate and resolve the complex tasks related to voice applications. This extends beyond voicemail to include interactive voice response systems, automated assistant, and call management systems. This also includes working with the statewide PBX network but not expert-level responsibility for the "parent" PBX system. While Ms. Zier may perform some work at a higher level, the majority of work assigned to her position resides within the ITS 4 classification. This is further supported by the level of work envisioned by the typical work statements for an ITS 4. Some examples include the following:

- Conducting capacity planning to determine the needs of an assigned area. Analyzing new capabilities . . . testing and evaluating new software and/or hardware products, documenting characteristics and making recommendations;
- Coordinating user/client requirements for computing services. Designing . . . telecommunications configurations to meet . . . multiple business unit needs. Designing specialized interfaces . . . telecommunication equipment;
- Designing/re-designing systems which may include such tasks as system modeling, system mapping and planning system connectivity; or re-configuring existing systems. . . .
- Planning, consulting, coordinating and directing or facilitating the installation of systems, hardware, software, application interfaces, or applications. Resolves complex installation problems, may coordinate with an installation vendor.
- Assesses and develops training . . .

Ms. Zier understands the customer's business needs and is conversant in the customer's business language. Her specialty area is voice applications. Mr. Whallon indicated Ms. Zier's performance level far exceeds expected competencies, and she is able to apply her knowledge of the customer's needs and voice applications to successfully complete assigned projects.

During the Director's review conference and throughout the documentation, Ms. Zier has emphasized that she performs the same duties as the ITS 5 positions in her unit. However, the Personnel Resources Board (PRB) has consistently held the following:

While a comparison of one position to another similar position may be useful in gaining a better understanding of the duties performed by and the level of responsibility assigned to an incumbent, allocation of a position must be based on the overall duties and responsibilities assigned to an individual position compared to the existing classifications. The allocation or misallocation of a similar position is not a determining factor in the appropriate allocation of a position. Byrnes v. Dept's of Personnel and Corrections, PRB No. R-ALLO-06-005 (2006), citing Flahaut v. Dept's of Personnel and Labor and Industries, PAB No. ALLO 96-0009 (1996).

Most positions within the civil service system occasionally perform duties that appear in more than one classification. However, when determining the appropriate classification for a specific position, the duties and responsibilities of that position must be considered in their entirety and the position must be allocated to the classification that provides the best fit overall for the majority of the position's duties and responsibilities. See Dudley v. Dept. of Labor and Industries, PRB Case No. R-ALLO-07-007 (2007).

It is clear Ms. Zier's work is highly valued and considered a critical piece of the work performed in support of statewide telephone and voice applications. A position's allocation is not a reflection of performance or an individual's ability to perform higher-level work. Rather, it is a comparison of the majority of work assigned to a position with the available job classifications. Based on the majority of Ms. Zier's assigned duties and responsibilities, the Information Technology Specialist 4 classification is the best fit.

### **Appeal Rights**

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to . . . the Washington personnel resources board . . . . Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

c: Sharon Zier  
Starleen Parsons, DIS  
Lisa Skriletz, DOP

Enclosure: List of Exhibits



**Sharon Zier v. Dept. of Information Services**  
**ALLO-7-112**

List of Exhibits

**A. Filed by Sharon Zier November 14, 2007:**

1. Request for Directors Review Form
2. DIS Determination Letter dated October 15, 2007:
3. Training profile (Demonstrative)
4. E-Correspondence
5. Duties compared to work group members (Ms. Zier's characterization of her duties noted in blue-part of her argument)
6. Co-workers' PDFs (Outside the scope of allocating criteria)
  - a. Ms. Zier's PDF
7. Information Technology Specialist 5 Classification Specification
8. Position Review Request signed & dated August 8, 2007
9. Position Description completed by Ms. Zier – contains the same information as the Position Review Request

**B. Filed by Sharon Zier March 12, 2008: Additions to the original filing.**

1. Position Description Form dated June 29, 2006 (electronic format)
2. Organizational Chart
3. Information Technology Specialist 4 Classification Specification
4. Revised Training (Demonstrative)

**C. Filed by DIS March 12, 2008:**

1. DIS Determination Letter dated October 15, 2007
2. Current Job Description - PDF updated June 26, 2006
3. Position Review Request form dated August 10, 2007:
4. Organizational Chart – Local Telephone Technical Services.
5. ITS 4 Classification Specification
6. ITS 5 Classification Specification